

HAND
DELIVERED

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LEGISLATIVE RESOURCE CENTER

MC

UNITED STATES HOUSE OF REPRESENTATIVES
2017 FINANCIAL DISCLOSURE STATEMENT

Form A
For Use by Members, Officers, and Employees

Name: Joseph P. Kennedy III

Daytime Telephone: 202-225-5931

Office Use Only
U.S. HOUSE OF REPRESENTATIVES

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: MA	District: 4	<input type="checkbox"/> Officer or Employee	Employing Office:	Staff Filer Type: (If Applicable) <input type="checkbox"/> Shared <input type="checkbox"/> Principal Assistant
REPORT TYPE	<input checked="" type="checkbox"/> 2017 Annual (Due: May 15, 2018)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination:		

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
b. Receive more than \$200 in unearned income from any reportable asset during the reporting period? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$390 in value from a single source during the reporting period? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$390 in value from a single source during the reporting period? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"

IPO – Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
TRUSTS – Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
EXEMPTION – Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III	Page <u>5</u> of <u>29</u>
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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of income						BLOCK E Transaction										
		A	B	C	D	E	F	G	H	I	J	K	L	M	Spouse/DC Assets over \$1,000,000*	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED FROM TRUST	TAX-DEFERRED	Other Type of Income (Specify A-G, Partnership Income or Farm Income)	I	II	III	IV	V	VI	VI	VI	VI	VI	XVII	XVIII	XIX
SP, DC, JT	ASSET NAME	EF																																		
	Trust U/WIND Frances B. Rauch																																			
	FBO Sheila R. Kennedy *																																			
	Assets include:																																			
	SSGA Inst US Treas MM Inv CL ED																																			
	Abbott Labs																																			
	Adient PLC	X																											S							
	Agilent Technologies																																			
	Anheuser Busch																																			
	Amazon Com Inc. Com																																			
	Analog Devices Inc.																																			
	Beckton Dickinson & Co.	X																																		
	Chevron Corp																																			
	CHUBB Ltd.		X																																	
	Coca Cola																																			
	Crown Castle Int'l Co. REIT																																			
	Deere & Co. Com	X																																		

* Filer is a discretionary beneficiary and has never received any income from this trust. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000

Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name:	Joseph P. Kennedy III	Page <u>6</u> of <u>29</u>
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BLOCK A Asset and/or Income Source	BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income							BLOCK E Transaction					
	A	B	C	D	E	F	G	H	I	J	K	L	M	Spouse/DC Asset over \$1,000,000*	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPT/BOARD/TRUST	TAX-DEFERRED	Other Type of Income (Specify A.g. Partnership Income or Farm Income)	I	II	III	IV	V	VI	VI	VI	IX	X	XI
	None	\$1-\$1,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000																					
SP, DC, JT	ASSET NAME	EF																															
	Disney & Co.													X																			
	Ecolab Inc. Com													X																			
	Facebook Inc. CL A													X																			
	General Electric Co.													X																			
	Honeywell Intl. Inc.													X																			
	JP Morgan Chase & Co. Com													X																			
	Johnson & Johnson Com													X																			
	Marriott Intl Inc.													X																			
	Medtronic PLC													X																			
	McDonalds Corp.													X																			
	MetLife Inc.													X																			
	Microsoft Corp. Com													X																			
	Nestle SA Sponsored ADR													X																			
	Nextera Energy Inc.													X																			
	Pfizer Inc.													X																			
	Procter and Gamble Co.													X																			

E

Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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***Filer is a discretionary beneficiary and has never received any income from this trust. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.**

I use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction						
		A	B	C	D	E	F	G	H	I	J	K	L	M	None	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED TRUST	TAX-DEFERRED	Other Type of Income (Specify, e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X
SP, DC, JT	ASSET NAME	EF																														
	Tax Exempt Trust U/W of																															
	R. Stewart Rauch f/b/o																															
	Sheila Rauch Kennedy and Her Descendants*																															
	Assets Include:																															
	State Street Bank & Trust														X																	
	Brandy Trust Multi-Strategy																															
	Common Trust Fund	X																														
	Brandy Trust Structured Index II	X																														
	Brandy Trust Global Com TR FD	X																														
	Brandy Trust Spi Eq Partners, LPX																															
	Brandy Trust Global Partners, LP	X																														
	End of Trust U/W of																															
	R. Stewart Rauch																															

*Filer is a discretionary beneficiary and has never received any income from this trust. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction								
		A	B	C	D	E	F	G	H	I	J	K	L	M	None	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPT FROM TRUST	TAX DEFERRED	One Type of Income (Specify e.g. Partnership Income or Farm Income)	None	I	II	III	IV	V	VI	VI	VII	VIII	IX	X
SP, DC, JT	ASSET NAME	EF																																
	Eleanor G. Brewster Trust*																X																	
	U/A dated 12/19/1936																																	
	Appointed UW Francis B. Rauch																																	
	If/b/o Sheila Rauch Kennedy and																																	
	Her Descendants Assets Include:																																	
	State Street Bank & Trust																X																	
	Greyfus Tree Sec Cash Mgmt Fund																X																	
	Eaton Vance Small Cap Fund	X															X																	
	Abbott Labs																X																	
	Accenture PLC																X																	
	Adient PLC	X																												S				
	Alphabet Inc. CL A																X																	
	Alphabet Inc. CL C																X																	
	Amazon Inc.																X																	
	Agilent Technologies																X																	
	Analog Devices Inc.																X																	

*Filer is a discretionary beneficiary. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000. There were no distributions during 2017.

Use additional sheets if more space is required.

P, S, S (part C), or E

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III	Page <u>11</u> of <u>29</u>
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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction						
		A	B	C	D	E	F	G	H	I	J	K	L	M	None	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED AND TRUST	TAX DEFERRED	None	I	II	III	IV	V	VI	VII	VIII	IX	X
SP, DC, JT	ASSET NAME	EF																														
Anheuser Busch																																
Avalonbay Communities Inc.																																
Celgene Corp.	X																														S	
CHUBB Ltd.																																
Coca Cola Company																																
Crown Castle Intl REIT																																
Deere & Co.																																
Disney Walt Co.																																
Ecolab Inc.																																
Eli & Lilly & Co.																																
Exxon Mobil Corp.																																
Facebook Inc. CL A																																
First Republic Bank San Fran																																
General Electric																																
Gilead Sciences Inc.	X																														S	
JP Morgan Chase & Co.																																

Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source	BLOCK B Value of Asset													BLOCK C Type of Income					BLOCK D Amount of Income						BLOCK E Transaction																			
	A	B	C	D	E	F	G	H	I	J	K	L	M	None	\$1-\$5,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$600,000	\$600,001-\$1,000,000	\$1,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000	Spouse/DC Assets over \$1,000,000*	None	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPT/FOUND TRUST	TAX-DEFERRED	Other Type of Income (Specify A, B, Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI
SP, DC, JT	ASSET NAME	EF																																										
	Nextera Energy Inc.								X																																			
	Waste Management Inc.							X																																				
	Nestle SA Sponsored ADR							X																																				
	Brandy Trust Global Common Trust Fund	X								X																																		
	Brandy Trust Multi Strategy																																											
	Common Trust	X								X																																		
	Brandy Trust Private Equity																																											
	LP (2003)	X						X																																				
	Brandy Trust SPL EQ PTNRS II,LP	X						X																																				
	Brandy Trust Special Equities																																											
	Partners, LP	X						X																																				
	Brandy Wine Private Equity																																											
	Partners (2005) LP	X							X																																			
	Brandy Wine Private Equity																																											
	Partners (2006) LP	X							X																																			
	Brandy Trust Global Partners LP	X							X																																			

Use additional sheets if more space is required.

E

P, S, S(part), or E

Spouse/DC Asset with income over \$1,000,000*

One \$5,000,000

Spouse/DC Asset with income over \$1,000,000*

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source			BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction							
	A	B	C	D	E	F	G	H	I	J	K	L	M		I	II	III	IV	V	VI	VII	VIII	X	XI	XII									
	None	\$1-\$5,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$250,000,000	\$250,000,001-\$500,000,000	\$500,000,001-\$1,000,000,000	Over \$1,000,000,000	Spouse/DC Asset over \$1,000,000*	None	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED/UND TRUST	TAX-PREFERRED	Other Type of Income (Specify a/n. Partnership Income or Farm Income)	None	\$1-\$200	\$201-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$1,000,000	\$1,000,001-\$5,000,000	Over \$5,000,000	Spouse/DC Asset with Income over \$1,000,000*	P, S, S(part), or E
SP, DC, JT	ASSET NAME	EF																																
	Brandy Wine Private Equity																																	
	Partners (2007) LP	X																																
	Brandy Wine Private Equity																																	
	Partners (2008) LP	X																									E							
	Brandy Wine Private Equity																																	
	Partners (2011) LP	X																																
	Brandy Wine Private Equity																																	
	Partners (2012) LP	X																									E							
	Brandy Wine Private Equity																																	
	Partners (2013) LP	X																									E							
	Brandy Wine Private Equity																																	
	Partners (2013A) LLC	X	X																								E							
	Brandy Wine Private Equity																																	
	Partners (2014) LP	X																																
	Brandy Wine Private Equity																																	
	Partners (2016) LP	X																																

Use additional sheets if more space is required.

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Joseph P. Kennedy III

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Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name:	Joseph P. Kennedy III	Page <u>16</u> of <u>29</u>
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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction							
		A	B	C	D	E	F	G	H	I	J	K	L	M	Spouse/DC Asset over \$1,000,000*	None	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED/UND TRUST	TAX DEFERRED	Other Type of Income (Specify, e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X
SP, DC, JT	ASSET NAME	EF																															
	George S. Brewster Trust*																																
	U/A dated 12/12/1934 as Appointed UW Frances B. Rauch																X																
	Wife Sheila Rauch Kennedy and Her Descendants Assets Include:																																
	State Street Bank & Trust																X																
	Drayfus Trees Sec Cash Mgmt Fund																X																
	Eaton Vance Small Cap Fund	X															X																
	Accenture PLC Ireland																X																
	Agilent Technologies	X																															
	Amazon INC																X																
	Anheuser Busch																X																
	Chubb Ltd.	X																															
	Coca Cola Company																X																
	Crown Castle Intl REIT																X																
	Deere & Co.																X																

*Filer is a discretionary beneficiary and has never received any income from this trust. Filer has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source	BLOCK B Value of Asset													BLOCK C Type of Income					BLOCK D Amount of Income							BLOCK E Transaction							
	A	B	C	D	E	F	G	H	I	J	K	L	M	Spouse/DC Assets over \$1,000,000*	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED FROM TRUST	TAX-REFERRED	Other Type of Income (Specify, if applicable, Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI
SP, DC, JT	ASSET NAME	EF																															
Disney Walt Co.														X																			
Ecolab Inc.														X																			
Facebook Inc. CL A														X																			
First Republic San Fran														X																			
General Electric Co.														X																			
Gilead Sciences Inc.														X												S							
Linear Technology Corp.														X												E/S							
Analog Devices Inc.														X												E							
Marriott Intl Inc. CL A														X																			
McDonalds Corp.														X																			
Medtronic PLC														X												E							
MetLife Inc.														X												E							
Brighthouse Financial Inc.														X																			
Microsoft Corp.														X																			
Pfizer														X																			
Procter & Gamble Co.														X																			

Use additional sheets if more space is required.

P, S, S(part), or E

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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BLOCK A Asset and/or Income Source			BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction								
	A	B	C	D	E	F	G	H	I	J	K	L	M		None	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify, e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E
SP, OC, JT	ASSET NAME	EF																																	
	Rockwell Intl Corp.																																		
	Schlumberger Ltd.																																		
	United Parcel Service																																		
	Wal Mart Stores																																		
	Waste Management Inc. Del																																		
	Wells Fargo and Company																																		
	Verizon Communications																																		
	Adient PLC	X																																	
	Brandy Trust Multi Strategy	X																																	
	Common Trust Fund																																		
	Brandy Trust Global Common Trust Fund	X																																	
	Abbott Labs																																		
	Alphabet CL A																																		
	Alphabet CL C																																		
	Celgene Corp.	X																																	
	Microchip Technology Inc.																																		

Use additional sheets if more space is required.

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SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III

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*Represents a distribution to filer from Residuary Trust U/W George S. Brewster. Filer is a discretionary beneficiary and has disclosed 100% of the assets of the trust that have a value in excess of \$1,000.

Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III	Page <u>21</u> of <u>29</u>
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BLOCK A Asset and/or Income Source		BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction								
		A	B	C	D	E	F	G	H	I	J	K	L	M	Spouse/DC Assets over \$1,000,000*	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED/BLND TRUST	TAX-DEFERRED	Other Type of Income (Specify, e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VI	VII	VIII	IX	X
SP, DC, JT	ASSET NAME	BF																																
	Chubb Ltd.																																	
	Crown Castle Intl REIT																																	
	CVS Caremark																																	
	Deere & Co.																																	
	Disney Walt Co.																																	
	Ecolab Inc.																																	
	Exxon Mobil Corp.																																	
	Facebook Inc. CL A																																	
	First Republic Bank San Fran																																	
	General Electric Co.																																	
	Gilead Sciences Inc.	X																											S					
	Hexcel Corp.																																	
	Intel Corp.																																	
	Johnson & Johnson																																	
	Marriott Intl. CL A																																	
	McDonalds Corp.																																	

Use additional sheets if more space is required.

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Joseph P. Kennedy III	Page <u>22</u> of <u>29</u>
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BLOCK A Asset and/or Income Source	BLOCK B Value of Asset												BLOCK C Type of Income						BLOCK D Amount of Income						BLOCK E Transaction								
	A	B	C	D	E	F	G	H	I	J	K	L	M	Spouse/DC Assets over \$1,000,000*	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCERPTED/BLIND TRUST	TAX DEFERRED	Other Type of Income (Specify, e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI
	None	\$1-\$5,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000	Spouse/DC Assets over \$1,000,000*																				
SP, DC, JT	ASSET NAME	BF																															
Microsoft Corp.																																	
Microchip Technologies Inc.																																	
Mondelez Intl.																																	
Nexera																																	
Rockwell Intl Corp.																																	
TJX COS Inc.																																	
Wells Fargo and Company																																	
Nestle SA Sponsored ADR																																	
Verizon Comm Inc.			X																														
Brandy Trust Global Common Tr Fd	X																																
Brandy Trust Multi Strategy																																	
Common Trust Fund	X																																
Brandy Trust Spl Eq Ptnrs. LP	X		X																														
Brandy Trust Global Partners LP	X																																
End of Residuary Trust																																	
U/W of George S. Brewster																																	

Use additional sheets if more space is required.

SCHEDULE B – TRANSACTIONS

Name: Joseph P. Kennedy, III

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		Type of Transaction				Check Box If Capital Gain Exceeded \$200	Date (Mo/Da/Yr) or Quarterly, Monthly, or Bi- Weekly, if applicable	Amount of Transaction										
		Purchase	Sale	Partial Sale	Exchange			A \$1,001- \$5,000	B \$5,001- \$10,000	C \$10,001- \$20,000	D \$20,001- \$50,000	E \$50,001- \$100,000	F \$100,001- \$250,000	G \$250,001- \$500,000	H \$500,001- \$1,000,000	I \$1,000,001- \$2,500,000	J \$2,500,001- \$5,000,000	K Over \$5,000,000 (Show DC Accts)
SP, DC, JT																		
SP	Example	Mega Corp. Stock		X		X	3/9/17		X									
JT	Adient PLC (Page 3, Item 1)		X			X	1/6/2017	X										
	Adient PLC (Page 5, Item 6)		X			X	1/6/2017	X										
	Celgene Corp (Page 7, Item 11)		X				5/19/2017		X									
	Adient PLC (Page 10, Item 11)		X			X	1/3/2017	X										
	Celgene Corp (Page 11, Item 3)		X				5/16/2017				X							
	Gilead Sciences (Page 11, Item 15)		X			X	5/16/2017			X								
	Brighthouse Financial Inc. (Page 12, Item 5) Received as a result of MetLife (Page 12, Item 4) SPIN OFF				X		8/4/2017	X										
	Brandy Wine Private Equity Partners (2013A) (Page 14 Item 12) merged back to Brandy Wine Private Equity Partners (2013) (Page 14, Item 10)				X		12/31/2017		X									
	Brandy Wine Private Equity Partners (2017) LP (Page 15, Item 1) Initial Capital Contribution	X					5/11/2017	X										
	Brandy Wine Private Equity Partners Yorktown Series 2006 (Page 15, Item 3) receipt of interest from Brandy Wine Private Equity Partners (2006) LP (Page 13, Item 14)				X		12/31/2017	X										
	Brighthouse Financial Inc. (Page 7, Item 12) Received as a result of MetLife (Page 6, Item 11) SPIN OFF				X		8/4/2017	X										

Use additional sheets if more space is required.

SCHEDULE B – TRANSACTIONS

Name: Joseph P. Kennedy III

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		Type of Transaction				Date (MORNING or Quarterly, Monthly, or Bi- Weekly, if applicable)	Amount of Transaction										
		Purchase	Sale	Partial Sale	Exchange		A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$2,500,000	H \$2,500,001- \$500,000,000	I Over \$500,000, 000	J Over \$1,000,000, 000	K Over \$10,000,000, 000
SP, DC, JT	Asset																
SP	Example	Mega Corp. Stock		X		X	3/5/15		X								
	Brandy Wine Private Equity Partners Yorktown				X		12/31/2017			X							
	Series 2008 (Page 15, Item 5) receipt of interest from																
	Brandy Wine Private Equity Partners (2008) LP																
	(Page 14, Item 3)																
	Brandy Wine Private Equity Partners Yorktown				X		12/31/2017				X						
	Series 2012 (Page 15, Item 7) receipt of interest from																
	Brandy Wine Private Equity Partners (2012) LP																
	(Page 14, Item 7)																
	Gilead Sciences (Page 17, Item 6)		X			X	5/16/2017		X								
	Linear Technology Corp (Page 17, Item 7)		X			X	3/14/2017		X								
	Analog Devices Inc. (Page 17, Item 8) received as a				X		3/14/2017		X								
	result of Linear Technology Corp (Page 17, Item 7)																
	Merger																
	Brighthouse Financial Inc. (Page 17, Item 13) received				X		8/4/2017		X								
	as a result of MetLife (Page 17, Item 12) SPIN OFF																
	Celgene Corp (Page 18, Item 15)		X				5/16/2017			X							
	Adient PLC (Page 20, Item 10)		X			X	1/3/2017		X								
	Gilead Sciences Inc. (Page 21, Item 11)		X			X	5/16/2017			X							

Use additional sheets if more space is required.

SCHEDULE C – EARNED INCOME

Name: Joseph P. Kennedy III

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. See examples below.

EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS AND PROHIBITED INCOME: The 2017 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,765. The 2018 limit is \$28,050. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

Use additional sheets if more space is required.

SCHEDULE D – LIABILITIES

Name: Joseph P. Kennedy III

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000.

*Column K is for liabilities held solely by your spouse or dependent child.

SP. DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability									
				A \$10,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$2,500,000	H \$2,500,001- \$500,000,000	I Over \$50,000,000	J Over \$1,000,000- \$5,000,000
	Example: First Bank of Wilmington, DE	5/15	Mortgage on Rental Property, Dover, DE				X						
JT	Wells Fargo Bank, N.A.	09/2016	Mortgage of Personal Residence, MA								X		
SP	Aspire Resources, Des Moines, IA *	09/2006	Student Loan		X								
SP	Harvard University, Cambridge, MA*	09/2006	Student Loan	X									
* Paid in full during year													

SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position	Name of Organization
Member Board of Directors	Robert F. Kennedy Human Rights (formerly Robert F. Kennedy Memorial)
Director	Robert F. Kennedy Children's Action Corps.
Member Board of Directors	Sooner Foundation
Member Advisory Board	Brigham and Women's Hospital - Ann Romney Center for Neurologic Diseases
Member Senior Advisory Committee	Harvard University Institute of Politics
Member Board of Trustees	Kennedy Center for the Performing Arts

Use additional sheets if more space is required.

SCHEDULE F – AGREEMENTS

Name: Joseph P. Kennedy III

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Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
	NONE	

SCHEDULE G – GIFTS

Report the source (by name), a brief description, and the value of all gifts totaling more than \$390 received by you, your spouse, or your dependent child from any source during the year. Exclude: Gifts from relatives, gifts of personal hospitality from an individual, local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$156 or less need not be added towards the \$390 disclosure threshold. Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule and some gifts require prior approval of the Committee on Ethics.

Source	Description	Value
Example: Mr. Joseph Smith, Arlington, VA	Silver Platter (prior determination of personal friendship received from the Committee on Ethics)	\$400
NONE		

Use additional sheets if more space is required.

SCHEDULE H – TRAVEL PAYMENTS and REIMBURSEMENTS

Name: Joseph P. Kennedy III

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Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$390 received by you, your spouse, or your dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

Use additional sheets if more space is required.

**SCHEDULE I – PAYMENTS MADE TO CHARITY IN
LIEU OF HONORARIA**

Name: Joseph P. Kennedy III

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List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of paying an honorarium to you. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Ethics.

Use additional sheets if more space is required.